

Claims

What is claimed is:

1. A method for providing a collaboration tool with which a client and one or more participants may interact comprising the steps of:

- a) enabling a client to authorize one or more participants to access client data;
- b) enabling the client to submit client data to the collaboration tool;
- c) enabling the client to submit one or more requests for one or more services to the collaboration tool; and
- d) enabling the client to interact with one or more participants through the collaboration tool wherein the collaboration tool further enables interaction among participants wherein interaction comprises exchange of client data.

2. The method of claim 1 wherein participants comprise advisors.

3. The method of claim 1 wherein participants comprise one or more entities authorized by the client to participate in the collaboration tool.

4. The method of claim 1 further comprising the step of e) enabling the client to define the scope of authorization for each participant.

5. The method of claim 1 wherein client data comprises financial documents.

6. The method of claim 1 wherein participants comprise financial advisors associated with the client.

7. The method of claim 1 wherein client data comprises client work product wherein client work product comprises one or more of documents, strategies, ideas, plans, correspondences and communications.

8. The method of claim 1 further comprising the step of f) enabling the client to view participant input wherein participant input comprises one or more of edits, analysis and comments related to client data.

9. The method of claim 1 further comprising a step of g) enabling the client to define one or more triggering events and one or more alert mechanisms for notifying the client of the occurrence of the one or more triggering events.

10. The method of claim 1 further comprising a step of h) enabling the client to access a client history database wherein the client history database maintains information related to previous updates.

11. A method for providing a collaboration tool with which one or more participants may collaborate with each other comprising the steps of:

- a) enabling the one or more participants to receive authorization by a client to access client data;
- b) enabling the one or more participants to access the collaboration tool where the collaboration tool enables the client to interact with one or more participants and enables the participants to interact with each other wherein client data is exchanged; and

c) enabling the one or more participants to access client data, as authorized by the client.

12. The method of claim 11 wherein participants comprise advisors.

13. The method of claim 11 wherein participants comprise one or more entity authorized by the client to participate in the collaboration tool.

14. The method of claim 11 further comprising the step of enabling the client to define the scope of authorization for each participant.

15. The method of claim 11 wherein client data comprises financial documents.

16. The method of claim 11 wherein participants comprise financial advisors associated with the client.

17. The method of claim 11 wherein client data comprises client work product wherein client work product comprises one or more of documents, strategies, ideas, plans, correspondences and communications.

18. The method of claim 11 further enabling the participant to provide participant input wherein participant input comprises one or more of edits, analysis and comments related to client data.

19. The method of claim 11 wherein participant activity is stored in a history database.

20. A system for providing a collaboration tool with which a client and one or more participants may interact comprising:

- 5 a) authorization means for enabling a client to authorize one or more participants to access client data;
- b) data means for enabling the client to submit client data to the collaboration tool;
- c) request means for enabling the client to submit one or more requests for one or more services to the collaboration tool; and
- d) interaction means for enabling the client to interact with one or more participants through the collaboration tool wherein the collaboration tool further enables interaction among participants wherein interaction comprises exchange of client data.
- 10

21. The system of claim 20 wherein participants comprise advisors.

22. The system of claim 20 wherein participants comprise one or more entities authorized by the client to participate in the collaboration tool.

23. The system of claim 20 further comprising scope means for enabling the client to define the scope of authorization for each participant.

15

24. The system of claim 20 wherein client data comprises financial documents.

25. The system of claim 20 wherein participants comprise financial advisors associated with the client.

26. The system of claim 20 wherein client data comprises client work product wherein client work product comprises one or more of documents, strategies, ideas, plans, correspondences and communications.

20

27. The system of claim 20 further comprising view means for enabling the client to view participant input wherein participant input comprises one or more of edits, analysis and comments related to client data.

28. The system of claim 20 further comprising alert means for enabling the client to define one or more triggering events and one or more alert mechanisms for notifying the client of the occurrence of the one or more triggering events.

29. The system of claim 20 further comprising a history database for storing information related to previous updates.

30. A system for providing a collaboration tool with which one or more participants may collaborate with each other comprising:

- a) authorization means for enabling the one or more participants to receive authorization by a client to access client data;
- b) access means for enabling the one or more participants to access the collaboration tool where the collaboration tool enables the client to interact with one or more participants and enables the participants to interact with each other wherein client data is exchanged; and
- c) data means for enabling the one or more participants to access client data, as authorized by the client.

31. The system of claim 30 wherein participants comprise advisors.

32. The system of claim 30 wherein participants comprise one or more entity authorized by the client to participate in the collaboration tool.

33. The system of claim 30 further comprising scope means for enabling the client to define the scope of authorization for each participant.

34. The system of claim 30 wherein client data comprises financial documents.

35. The system of claim 30 wherein participants comprise financial advisors associated with the client.

36. The system of claim 30 wherein client data comprises client work product wherein client work product comprises one or more of documents, strategies, ideas, plans, correspondences and communications.

37. The system of claim 30 further comprising input means for enabling the participant to provide participant input wherein participant input comprises one or more of edits, analysis and comments related to client data.

38. The system of claim 30 wherein participant activity is stored in a history database.